


October 9, 2020

# Maintain your holdings through WorldCat data sync

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Member Education


# What is data sync; what does it do?

- Data sync is an automated process that compares records from your library against records in WorldCat and manages holdings on those matching records; and, it facilitates adding new records to WorldCat
- Holdings may be at the:
  - Institution-level
  - Local-level, LHRs attached to bibliographic records



OCL Holdings - 680 other holdings 1 OCL holding in GLIMIR cluster; 680 other holdings in GLIMIR cluster
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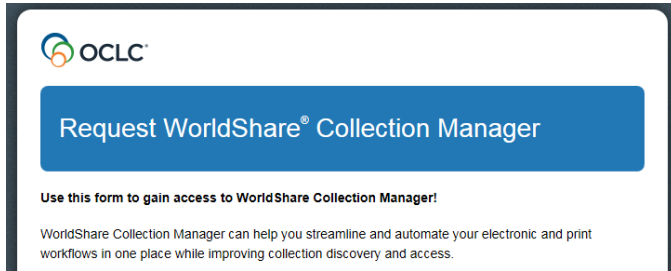
Local Holdings Record: Your genealogy today.			
OCLC 957041837	ISSN 2369-0003	Freq b	Dates 2015-9999
<a href="#">Summary</a>	v. 1, no. 1 (March/April 2015)-		



# WorldShare Collection Manager

- WorldCat data sync collections are part of WorldShare>Metadata > Collection Manager
- WorldShare access via custom Web address
- If you do not have WorldShare...use this form to request an account

Questions?  
Contact OCLC Support  
[support@oclc.org](mailto:support@oclc.org)



The screenshot shows the OCLC logo at the top left. Below it is a large blue button with the text "Request WorldShare® Collection Manager". Underneath the button, there is a line of text: "Use this form to gain access to WorldShare Collection Manager!". At the bottom, there is a paragraph of text: "WorldShare Collection Manager can help you streamline and automate your electronic and print workflows in one place while improving collection discovery and access."

Enter Institution and  
Contact Information /  
submit form

<https://www.oclc.org/content/forms/worldwide/en/wckb-request.html>

# Today we will...

- Review collection types:
  - Bibliographic
  - Delete WorldCat holdings
- Review accepted data:
  - MARC or non-MARC
- Review collection creation
- Review processing options:
  - Reclamation
  - Ongoing updates
- Review steps to get started
- Questions & discussion



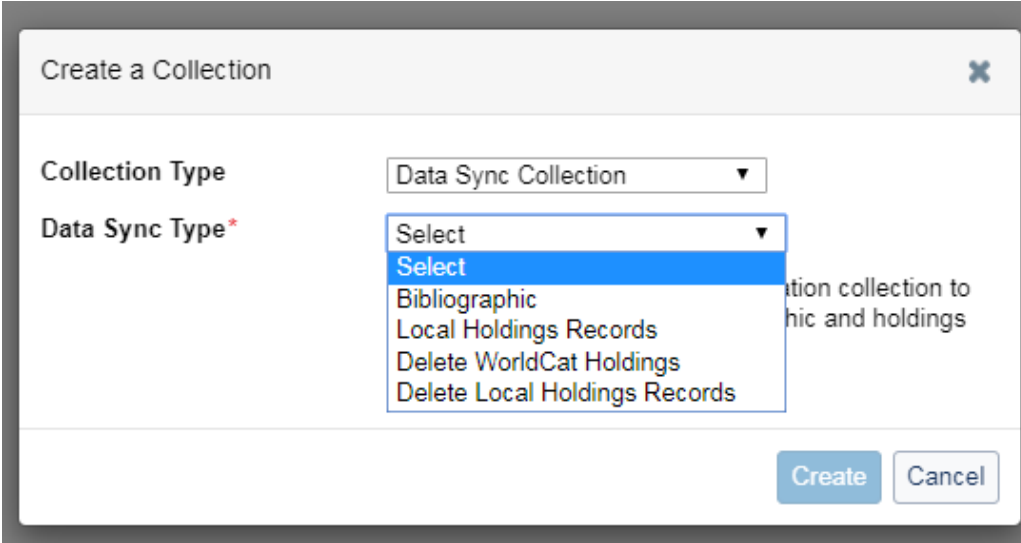
[This Photo](#) by Unknown Author is licensed under [CC BY-NC-ND](#)

# Data sync collection types

Choose the type based on data type and processing specifications

- Bibliographic – ***most versatile***
- Delete WorldCat holdings

If processing specifications and data does not change, use same collection to send subsequent files



The screenshot shows a 'Create a Collection' dialog box with a close button (X) in the top right corner. It contains two dropdown menus. The first, 'Collection Type', is set to 'Data Sync Collection'. The second, 'Data Sync Type\*', is open, showing a list of options: 'Select' (highlighted in blue), 'Bibliographic', 'Local Holdings Records', 'Delete WorldCat Holdings', and 'Delete Local Holdings Records'. To the right of the 'Data Sync Type\*' dropdown, there is partially visible text: 'ation collection to' and 'hic and holdings'. At the bottom right of the dialog are 'Create' and 'Cancel' buttons.

# Use a bibliographic collection to...

- Set holdings on matching records in WorldCat to indicate ownership of the item in your library's collection
- Send all records from your library's collection to synchronize these holdings with WorldCat (reclamation)
- Send subsequent files, after reclamation, to ensure your holdings remain up to date

# Use Delete WorldCat holdings collection to...

- Remove holdings from records in WorldCat where your symbol was previously set
- Help maintain up to date holdings that can impact success when using resource sharing and discovery

## MARC data

Books		Rec Stat	Entered	20160812	Replaced	20170508140551.2
Type	a	ELvl	Srcce	Audn	Ctrl	
BLvl	m	Form	Conf	Biog	MRec	
		Cont	GPub	LitF	Indx	0
Desc	i	Ills	Fest	DtSt	Dates	2016
010			2016028804			
040			DLC <b>fb</b> eng <b>rd</b> rda <b>tc</b> DLC <b>td</b> YDX <b>td</b> YDXCP <b>td</b> BTCTA <b>td</b> BDX <b>td</b> HQD <b>td</b> AZZPT <b>td</b> JSE <b>td</b> CPP <b>td</b> ABG <b>td</b> ZHB <b>td</b> VP@ <b>td</b> OCLCF <b>td</b> COO <b>td</b> NDS <b>td</b> UNBCA <b>td</b> CZA <b>td</b> RBD <b>td</b> HLNDP <b>td</b> MX8 <b>td</b> YUS <b>td</b> TEU <b>td</b> OSU <b>td</b> TXCLH <b>td</b> ECL <b>td</b> TXLPL <b>td</b> WIMVL <b>td</b> CUT <b>td</b> GL3 <b>td</b> TXNES <b>td</b> OCLCO <b>td</b> OCLCQ <b>td</b> OCLCO <b>td</b> SCZ			
020			9780062491794 \$q (hardcover)			
020			0062491792 \$q (hardcover)			
020			9780062563200			
035			(OCoLC) 932576291			
024	8		99969064275			
042			pcc			
050	0 0		PS3566.A7756 \$b C66 2016			
082	0 0		813/.54 \$2 23			
049			OCLC			
100	1		Patchett, Ann, <b>te</b> author.			
245	1 0		Commonwealth : \$b a novel / s			
250			First edition.			
264	1		New York, NY : \$b Harper, \$c			
300			322 pages ; \$c 24 cm			
336			text \$b bt \$2 rdacontent			
337			unmediated \$b n \$2 rdamedia			
338			volume \$b nc \$2 rdacarrier			
520			"The acclaimed, bestselling author of <i>Commonwealth</i> returns with a new novel that explores the complexities of family, love, and responsibility. Bird is a story of two families' lives. One Sunday afternoon in Southern California, Bert Cousins shows up at Franny Keating's christening party, and the two families' lives are forever changed. Bird is a story of two families' lives. One Sunday afternoon in Southern California, Bert Cousins shows up at Franny Keating's christening party, and the two families' lives are forever changed. Bird is a story of two families' lives. One Sunday afternoon in Southern California, Bert Cousins shows up at Franny Keating's christening party, and the two families' lives are forever changed."			



# Non-MARC data in .csv file format

OCLC numbers		
	A	B
1	<b>LSN</b>	<b>OCLC_Number</b>
2	42137596	(OCoLC)932576297
3	37562148	(OCoLC)39197889
4	36362514	(OCoLC)91898967
5	41236980	(OCoLC)23236548
6	85463791	(OCoLC)87965300
7	19264835	(OCoLC)93257690
8	26154879	(OCoLC)1414255
9	62958471	(OCoLC)2326958
10		

Two column format with

A: Local system number (LSN)

B: OCLC record number (OCoLC)

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# CREATE A BIBLIOGRAPHIC COLLECTION

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# Bibliographic collection > Properties

Save

Collection Actions ▼

► Properties

► Bibliographic Record Information

► Local Bibliographic Data Information

► MARC Record Output Information

► Contact Information

Collection Name: **TX Navigator updates\*\***

Collection ID: [system-supplied 7-digits]

Original data format: MARC

Collection Type: Bibliographic

Third Party/Consortia Name

Texas navigator project

Description: notes about data, processing, etc.

**\*\* Use TX Navigator** in Collection Name to help easily locate these collections

# Bibliographic record information > System

Enter information about your data

▼ Bibliographic Record Information

Initial Estimate for Record Count \*

System Processing

Provider

System Name

Version

OCLC Number Location(s)

Local System Number Location(s) \*

Location	<input type="text" value="035 \$a"/>	Tag	<input type="text" value="035"/>	Subfield	<input type="text" value="a"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Location	<input type="text" value="001"/>	Tag	<input type="text" value="001"/>	Subfield	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

# Contacts

## ▼ Contact Information

\* Required field

Fill out all of the contact information fields for at least one individual. We recommend that you provide the contact information for two to three individuals. List the contacts in order with the primary contact in the first row.

	Last Name*	First Name*	Title*	Telephone*	Email Address*	Action
↓	<input type="text" value="Kie"/>	<input type="text" value="Kathy"/>	<input type="text" value="Member Education"/>	<input type="text" value="800-848-5878"/>	<input type="text" value="kiek@oclc.org"/>	<div><div>+</div><div>-</div></div>
↑	<input type="text" value="Kelley"/>	<input type="text" value="John"/>	<input type="text" value="System Administrator"/>	<input type="text" value="800-848-5800"/>	<input type="text" value="xxxx@library.org"/>	<div><div>+</div><div>-</div></div>

OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the [Privacy Policy](#).

Enter 2 or 3 individuals in order of priority  
Use + in Action column to add line; - deletes a line  
Data is required in each column

# Save and add comments

1. **Save** collection
  - Collection ID is created
2. Add **Comments**
3. **Submit** collection to OCLC

A screenshot of a web interface showing a dropdown menu titled 'Collection Actions'. The 'Save' button is highlighted with an orange box. Below it, the 'Submit Collection to OCLC' option is also highlighted with an orange box. Other visible options include 'Make Default Collection' and 'Properties'.

A screenshot of a web interface showing a dropdown menu titled 'Comments' highlighted with an orange box.

Add Comment

Results 1 - 1 of 1

Topic

[First Comment](#)

This

Results 1 - 1 of 1

Add Comment for user WorldShare Trainer

\* Required field

Topic \*

Processing

Comment \*

Records will be sent with Rec Stat values a, c or d to be processed accordingly.  
Please contact us if there are problems with this arrangement.

(144/4000)

Add Comment

Cancel

# Institution settings: Reports

## Institution Settings

Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

Receive Email Reports ☒ Yes  
☐ No

Authorization Code\*  ?

Report Types\*

- ▶ Records Reports
- ▶ WorldCat Holdings Reports
- ▶ Cataloging Partner Reports
- ▶ Data Sync Reports

Email Address(es)\*  ?

### ▼ Data Sync Reports

- ☐ Data Sync Records
- ☐ Data Sync Monthly Records
- ☒ Bibliographic Record Processing
- ☒ Bibliographic Record Processing Exceptions
- ☐ LHR Processing
- ☐ LHR Processing Exceptions

# Review: Bibliographic Collection

1. **Properties**, use TX Navigator in Collection name
  - Original Data Format: *MARC* ; Use Record Status for Processing: NO
  - **Third Party/Consortia: Texas Navigator project (optional)**
  - Description: provide more info about data, specifications, source of records
2. **Bibliographic Record**, System: OCLC number location & local system number location
  - Processing: maintain default values
3. **Contact Information**, add two to three individuals, with primary contact first
4. **Save** collection to generate Collection ID
5. **Comments**, enter questions or more details about collection, data or processing
6. **Collection Actions** > Submit collection to OCLC
7. **Institution Settings > Reports**, enable reports from data sync processing



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# QUESTIONS & DISCUSSION

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# DELETE WORLDCAT HOLDINGS

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# Delete WorldCat holdings accepts ...

OCLC numbers		
	A	B
1	LSN	OCLC_Number
2	42137596	(OCoLC)932576297
3	37562148	(OCoLC)39197889
4	36362514	(OCoLC)91898967
5	41236980	(OCoLC)23236548
6	85463791	(OCoLC)87965300
7	19264835	(OCoLC)93257690
8	26154879	(OCoLC)1414255
9	62958471	(OCoLC)2326958
10		

Column A: Local system number

Column B: OCLC record number (w prefix)

**MARC records** sent in this collection type will have holdings deleted on all matching WorldCat records

# Delete WorldCat holdings collection

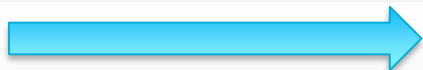
Save

Collection Actions ▼

► Properties

► Bibliographic Record Information

► Contact Information



**\*\* Use TX Navigator in Collection Name to help easily locate these collections**

Collection Name: **TX Navigator** deletes\*\*

Collection ID: [system-supplied 7-digits]

Third Party/Consortia Name

Texas navigator group project

Collection Type

Delete WorldCat Holdings

Original Data Format

☐ MARC

☒ Non-MARC

Sending Numeric Search Keys for Holdings Maintenance Only

☒ Yes

☐ No



**Non-MARC holdings require a file.**

You must send a .CSV (comma-separated) file so that OCLC can set or delete your WorldCat holdings.

Description: **OCLC numbers only**

# Bibliographic record information

Only information needed is for the record (search key) count



▼ Bibliographic Record Information

Initial Estimate for Record Count \*

System Processing

A large blue arrow points from the right towards the text input field containing '50,000'.

# Data requirements for non-MARC files

## Data requirements

Data must be sent as a .CSV file, consisting of a spreadsheet such as Excel, containing two columns. It must be saved as CSV UTF-8 (Comma delimited) and encoded as Unicode (UTF-8).

- The first column of the spreadsheet should contain no data save for the heading "LSN". Processing of the data will add an arbitrary value so WorldCat records can be output for Holdings Maintenance Only.
- The second column should have the heading "OCLC\_Number" and contain a list of OCLC control numbers with the prefix "(OCoLC)", e.g., (OCoLC)198765401.

Download the  [Numeric search key template](#).

**Note:**

- Both columns must be present in the spreadsheet even though the LSN column will remain empty.
- The order of the columns in the template should not be changed.
- Save the template as CSV UTF-8 (Comma delimited) and the encoding as Unicode (UTF-8).

## Encode a .CSV Excel file to Unicode (UTF-8)

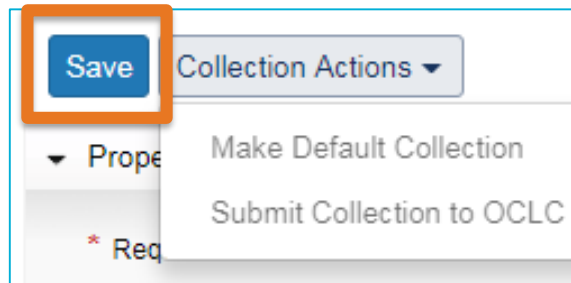
**Note:** UTF-8 encoding a .CSV in Excel is not available for Mac.



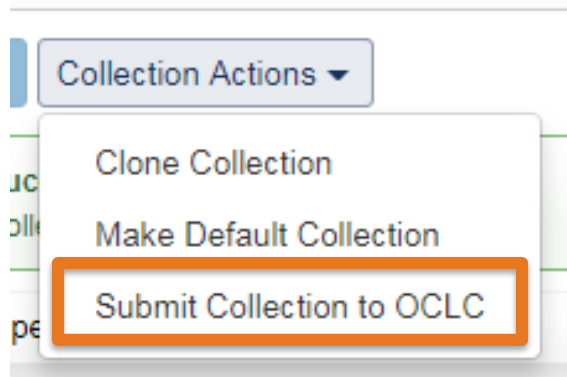
More info: **Data requirements for non-MARC numeric search key collections**

# Save and add comments

- **Save** collection
  - Collection ID is created
  - Comments panel appears



- Add comments
- When ready, **submit** collection to OCLC



# Review: Delete WorldCat holdings

1. **Properties**, Original Data Format: non-MARC
  - Sending Numeric Search Keys for Holdings Maintenance Only: **YES**
2. **Bibliographic Record**, enter number of search keys to be sent
3. Add **Contact Information**, **Save** collection
4. Add **Comments** if applicable
5. **Submit** collection
6. **Settings > Reports**, sign up to receive reports from data sync processing \*
  - Only need to do this once, unless email addresses change



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# QUESTIONS & DISCUSSION

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# RECLAMATION PROCESSING

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# Bibliographic and post-process scan/delete

A reclamation process will ...

1. Match your records in WorldCat to set holdings; time-stamps them;
2. Cancel holdings on records that were set earlier than the time-stamp from the data sync transaction.

This process is useful to bring holdings up-to-date if they have not been consistently maintained in WorldCat and it is difficult to isolate the records that need to be updated from your database or from WorldCat.

Please contact [OCLC Support](#) before creating a collection for a reclamation, or before sending a reclamation through an existing collection.

# Considerations with reclamation process...

- OCLC verifies your eligibility for the reclamation processing
- OCLC data sync staff confirms with you the date to use for the scan/delete before processing any files
- A list of titles where holdings will be deleted can be produced prior to the scan/delete
- Request this list in Comments when collection is created

# Data to send for reclamation processing...

- OCLC accepts both MARC data and non-MARC data for reclamation processing
- Create data sync collection for each type of data to send
- Add Reclamation comment to each project to ensure they will be processed before the scan/delete is started


# Data to send for reclamation processing...

- If OCLC numbers can be extracted from records, create and send these as a non-MARC project
- Separately, create a MARC project to send the sparse records, those that do not have OCLC numbers
- Use unresolved records report from MARC project to identify and update records in your local system
- Re-send these records for subsequent processing

# Bibliographic collection > Properties

Save

Collection Actions ▼

- ▶ Properties 
- ▶ Bibliographic Record Information
- ▶ Local Bibliographic Data Information
- ▶ MARC Record Output Information
- ▶ Contact Information

Collection Name: **TX Navigator project** \*\*

Collection ID: [system-supplied 7-digits]

Original data format: MARC

Collection Type: Bibliographic

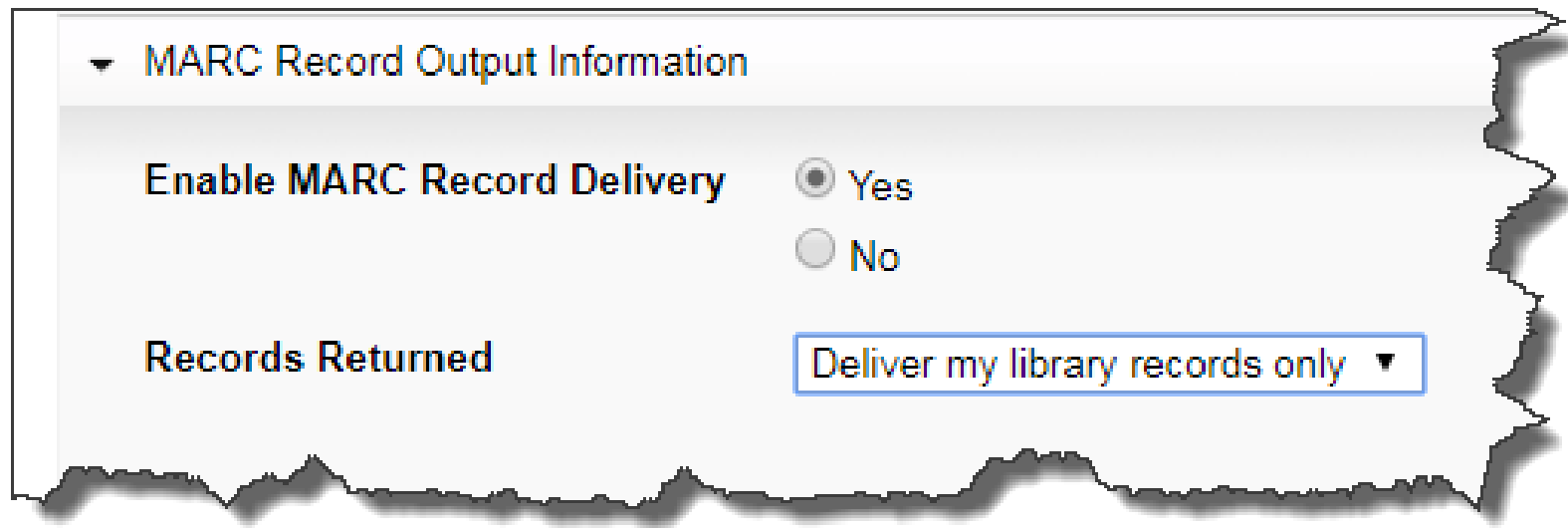
Third Party/Consortia Name

Texas navigator project

Description: **Reclamation** project

\*\* Use **TX Navigator** in Collection Name to help easily locate these collections

# MARC record output



▼ MARC Record Output Information

Enable MARC Record Delivery ☒ Yes ☐ No

Records Returned Deliver my library records only ▼

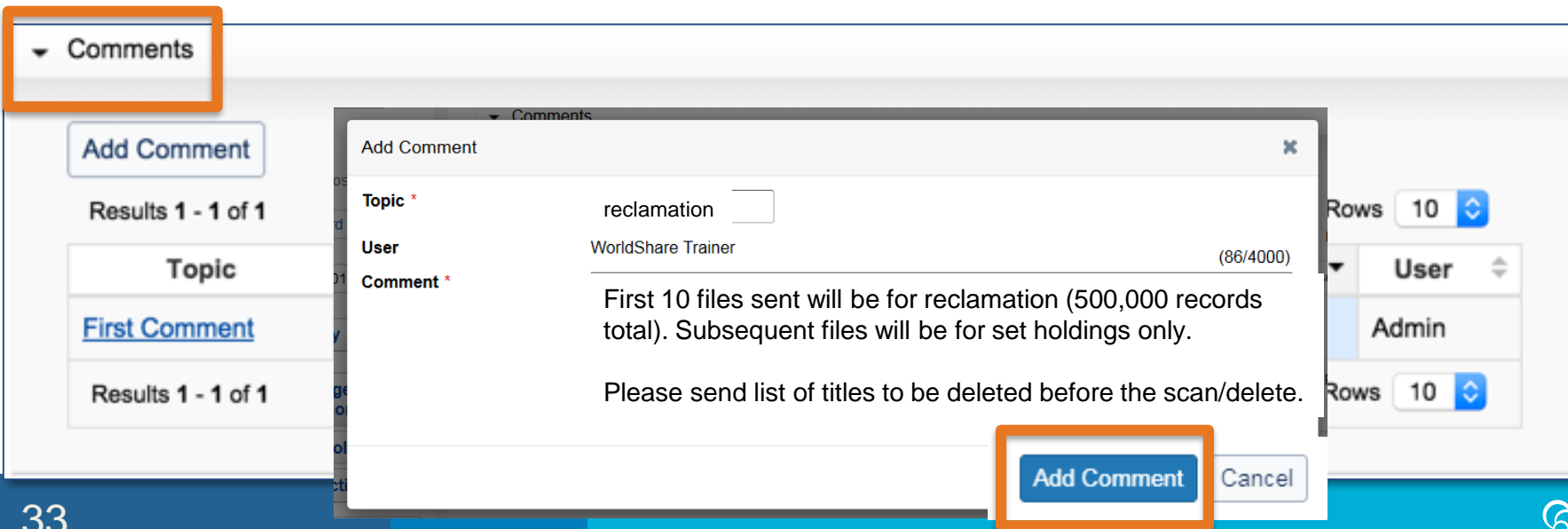
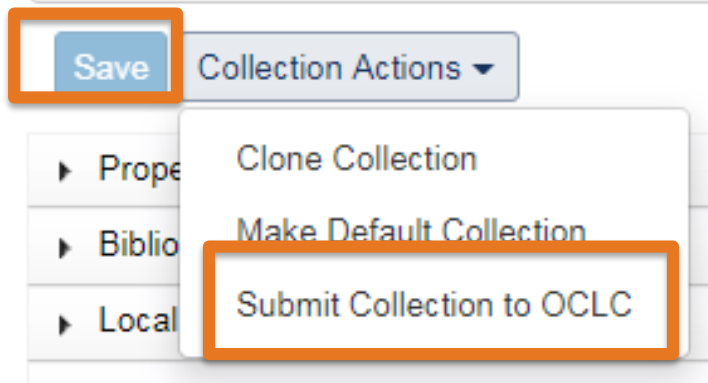
OCCLC numbers inserted to field 035 \$a with (OCoLC) prefix



# Save and add comments

## 1. Save collection

- Collection ID is created
- Comments panel appears



# Review: Bibliographic reclamation

- Start your reclamation conversation at OCLC Support
- OCLC Support staff gathers information about reclamation goals, timeframe and other details \*\*
- Library creates bibliographic data sync collection and submits data for reclamation processing

\*\* other conversations may occur before collection is started

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# QUESTIONS & DISCUSSION

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# REVIEW INSTITUTION SETTINGS

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# Institution settings: OCLC symbol

The screenshot displays the WorldShare Collection Manager interface. On the left, a sidebar menu is highlighted with an orange box, containing links for Record Manager, Collection Manager, My Files, and My Apps. An orange arrow points from the 'Collection Manager' link to the 'Settings' button in the left-hand pane of the main content area. The main content area is titled 'WorldShare > Metadata > Collection Manager' and features a top navigation bar with tabs for Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The 'Settings' pane on the right is active, showing a 'Save' button and a list of settings: OCLC Symbol, Knowledge Base Data, WorldCat Holdings, Proxy and Authentication, Provider Settings, Sharing, WorldCat Discovery, MARC Records, Reports, and Display Options. Three orange arrows point to the 'OCLC Symbol', 'MARC Records', and 'Reports' settings.

WorldShare® > Metadata > Collection Manager

Metadata Acquisitions Licenses Circulation Interlibrary Loan Analytics Admin

Record Manager

Collection Manager

My Files

My Apps

Collection Manager

Collection

My Selected Collections

Search

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

Settings

Save

OCLC Symbol

Knowledge Base Data

WorldCat Holdings

Proxy and Authentication

Provider Settings

Sharing

WorldCat Discovery

MARC Records

Reports

Display Options

# Institution settings: Reports

WorldShare®

Metadata Acquisitions Circulation Analytics Admin

Record Manager

Collection Manager

Collection  ?

☒ My Selected Collections

Search

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

Settings

Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

Receive Email Reports ☒ Yes ☐ No

Authorization Code\*  ?

Report Types\*

- ▶ Records Reports
- ▶ WorldCat Holdings Reports
- ▶ Cataloging Partner Reports
- ▶ Data Sync Reports

Email Address(es)\*  ?

Report Format ☐ HTML ☒ Excel

Receive as ☒ Email Attachment ☐ Hyperlink

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# NAME AND UPLOAD FILES

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# File name should have...

- Collection ID -- unique 7-digit identifier is first in filename
  - assigned when collection is saved / submitted
- OCLC symbol – is second
- Alphanumeric characters in upper or lower case (optional)
- Periods ( . ) between each part of the file name
- Do not use:
  - Periods, dashes, underscores
  - Spaces and other non-alphanumeric characters



# Acceptable file names

1095987.TSF.updates.**mrc** (MARC records)

Collection ID   OCLC Symbol   Description   File extension

1004100.TS259.deletes.**csv** (OCLC numbers)

If your OCLC symbol contains \$, #, @, substitute characters in file name:

- @ will be replaced with **\_64**
- \$ will be replaced with **\_36**
- # will be replaced with **\_35**

# Two ways to exchange files

- There are 2 ways to exchange files
  - Metadata > My Files > Upload or Download
  - OCLC file exchange server
    - OCLC supports SFTP for this exchange

# Metadata > My Files > Uploads

WorldShare®

0 Metadata Acquisitions Licenses Circulation Interlibrary Loan

Record Manager

My Labels

Collection Manager

My Files

Uploads

Uploads

Upload File

Choose File 1234567.OC...lename.mrc

File Type

☒ Data sync bibliographic

☐ Data sync LHR

Upload

Results 1 - 10 of 13

Rows

10

<<

1

2

>>

File Name	File Type	Size	Upload Date
1234567.OCWMS.updates.mrc	Data sync bibliographic	2 KB	10/09/2020

Rows

10

# File exchange server transition

- OCLC transitioned to a new file exchange server as of 30 September 2020.
- A new host name and username logon are needed to access the new exchange location.
- Please contact [OCLC Support](#) to obtain these credentials for your institution.

# File exchange server

- The FTP client FileZilla is supported for this exchange
- The host name is **[geographic/specific]** and port is based on data being exchanged:
  - Host: filex-m1.oclc.org (Dublin) and port: 22
- An institution-specific username and password
- Documentation is available under:
- Librarian's Toolbox > Exchange files with OCLC

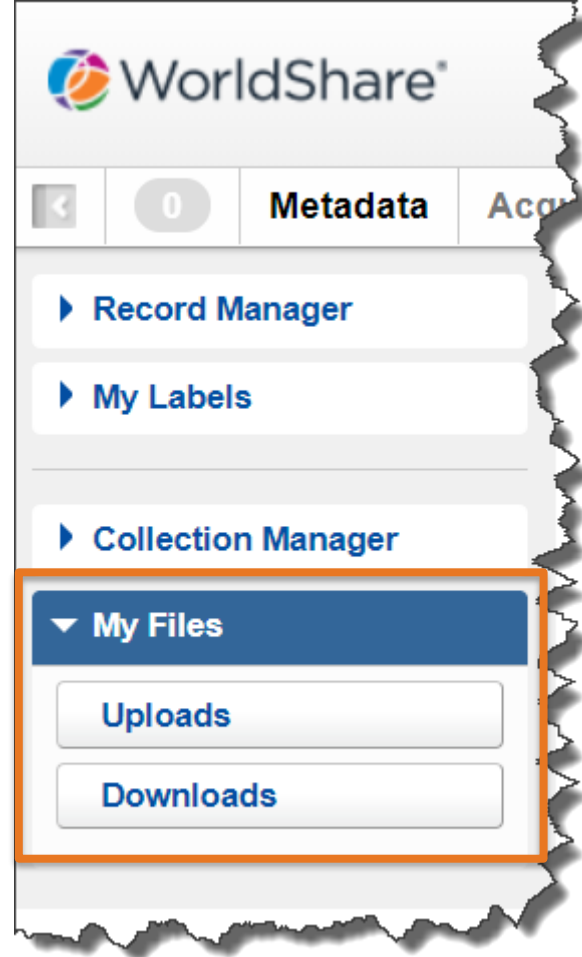
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# POST PROCESSING REPORTS AND FILES

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# Post / Processing

1. Obtain output files and review processing summaries and exception data reports
2. Review unresolved records to correct/re-send
  - Local system
  - OCLC Connexion \*
    - \* cataloging subscription needed



# Reports and files

- Reports for **bibliographic** and **delete WorldCat holdings** collections are in these categories:
  - Bibliographic
  - Holdings
  - Local bibliographic data or LBD
- In addition, bibliographic collections generate
  - Cross reference reports
  - MyLibraryRecords files (library's records returned after processing)



# Access reports through Metadata > My Files

The screenshot shows the WorldShare interface with the following elements:

- WorldShare** logo at the top left.
- A navigation bar with tabs: Metadata (1), Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin.
- A left sidebar with a menu: Record Manager, My Labels, Collection Manager, My Files (2), Uploads, and Downloads (3).
- The main content area has a sub-header "Downloads" and two tabs: "Records and Reports" and "KB Downloads".
- Under the "Records and Reports" tab, there is a section titled "Records and Reports" containing a "Filter by" dropdown menu (4) set to "Reports", a "Reset" link, and a "Downloaded" checkbox labeled "Hide downloaded files".
- At the bottom, there is a table header with columns: File Name, File Type, and Size.

# Reports and files

- Each category generates reports, named accordingly
- Bibliographic reports include:
  - Processing - **BibProcessingReport.txt**
  - Exception - **BibExceptionReport.txt**
  - Summary - **BibSummaryReport.txt**

# Bibliographic record processing report

Bib action

DINAT-DINAT.1035652.IN.BIB.D20200623.T230216464.1035652.DINAT.200129.02.mrc.BibProcessingReport.txt

```
0 10 20 30 40 50 60 70 80
DINAT_1035652_1592967736464::bib::235687684|14521183|958455204|958455204|match-
DINAT_1035652_1592967736464::bib::215920815|14514301|958099586|958099586|match-
DINAT_1035652_1592967736464::bib::425412|12364441|972509433|972509433|field transfer-
DINAT_1035652_1592967736464::bib::182340671|14503728|911386461|911386461|match-
DINAT_1035652_1592967736464::bib::59819734|14469038|310375210|310375210|match-
DINAT_1035652_1592967736464::bib::215876135|14514284|958098717|958098717|match-
DINAT_1035652_1592967736464::bib::2467303|14433858||1159735069|unresolved-
DINAT_1035652_1592967736464::bib::44168074|14461953|191701850|191701850|match-
DINAT_1035652_1592967736464::bib::99767861|14479808|801405546|801405546|match-
DINAT_1035652_1592967736464::bib::153624514|14495378|881183770|881183770|match-
DINAT_1035652_1592967736464::bib::210974012|1451759|95204|948|953047049|match-
```

- OCWMS-OCWMS. 1234567.IN.BIB.D20200505.T092612933.  
1234567.OCWMS.OriginalFilename.mrc.BibProcessingReport.txt

# Cross reference reports

Bibliographic Cross Reference Report includes records from the bibActions:

- create, match, replace, or field transfer

Report name follows same conventions as other reports:

- OCWMS-OCWMS. 1234567.IN.BIB.  
D20200505.T092612933.  
1234567.OCWMS.Recordupdates.mrc.  
**BibCrossRefReport.txt**

LSN                      Matched  
WorldCat OCN

	0	10	20
1	14461235»	173514503	↵
2	14461347»	179084333	↵
3	14493651»	874563095	↵
4	14468490»	276273971	↵
5	14502983»	908079335	↵
6	14514518»	958105032	↵
7	14490164»	864911565	↵
8	14489578»	863157444	↵
9	14514888»	958108220	↵
10	14459908»	82934474	↵
11	13827716»	1138497792	↵
12	14478226»	781629126	↵
13	14456895»	58399045	↵
14	14475877»	705929295	↵
15	14517703»	952728426	↵

# Unresolved cross reference reports

Bibliographic Unresolved Cross Reference Report includes only records from a bibAction of **unresolved**

Report name follows same conventions as other reports

- OCWMS-OCWMS. 1234567.IN.BIB.  
D20200505.T092612933. 1234567.  
OCWMS.Recordupdates.mrc.  
**BibUnresolvedCrossRefReport.txt**

	LSN	OCN for record in WorldCat staging
1	1513436»	1159699720~
2	1422702»	1159699755~
3	1051677»	1159699733~
4	585468»	1159699726~
5	1072752»	1159699705~
6	1420978»	1159699761~
7	1078685»	1159699782~
8	1421517»	1159699684~
9	677217»	1159699817~
10	769202»	1159699663~
11	1095556»	1159699719~
12	1100548»	1159699670~
13	678271»	1159699677~

# Reports and files

- WorldCat holdings
- **HoldingsProcessingReport.txt**
- **HoldingsSummaryReport.txt**



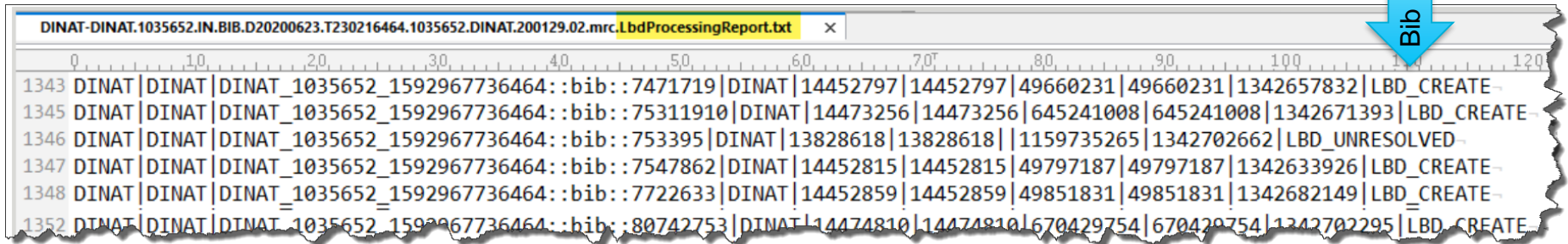
DIBPL-DIBPL.1036940.IN.BIB.D20200801.T154214243.1036940.DIBPL.mrc.HoldingProcessingReport.txt													
0	10	20	30	40	50	60	70	80	90	100	110		
11	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::104598938		990117413360203941		82900276		82900276		HOLDING_SET~
12	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::104863169		990001815070203941		3520679		3520679		HOLDING_SET~
13	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::105038833		990117837640203941		561872514		561872514		HOLDING_SET~
14	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::105300065		990013055810203941		12656301		12656301		HOLDING_SET~
15	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::105518088		990022363430203941		895710		895710		HOLDING_SET~
16	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::105518617		990022391900203941		1539687		1539687		HOLDING_SET~
17	DIBPL		DIBPL		DIBPL_1036940_1596310934243::bib::10553450		990024653880203941		7391031		7391031		HOLDING_ALREADY_SET~

- **OCWMS-OCWMS. 1234567.IN.BIB.D20200505.T092612933.**  
**1234567.OCWMS.OriginalFilename.mrc.HoldingProcessingReport.txt**



# Reports and files

- Local bib data reports (LBD) are named:
  - LBDProcessingReport.txt**
  - LBDSummaryReport.txt**



The screenshot shows a text file named `LbdProcessingReport.txt` with a table of data. The table has 12 columns. The first column contains line numbers (1343-1352). The second column contains the word 'DINAT'. The third column contains a long alphanumeric string. The fourth column contains a colon followed by a three-digit number. The fifth column contains a colon followed by a three-digit number. The sixth column contains the word 'DINAT'. The seventh column contains a long alphanumeric string. The eighth column contains a long alphanumeric string. The ninth column contains a long alphanumeric string. The tenth column contains a long alphanumeric string. The eleventh column contains a long alphanumeric string. The twelfth column contains a long alphanumeric string. The table is as follows:

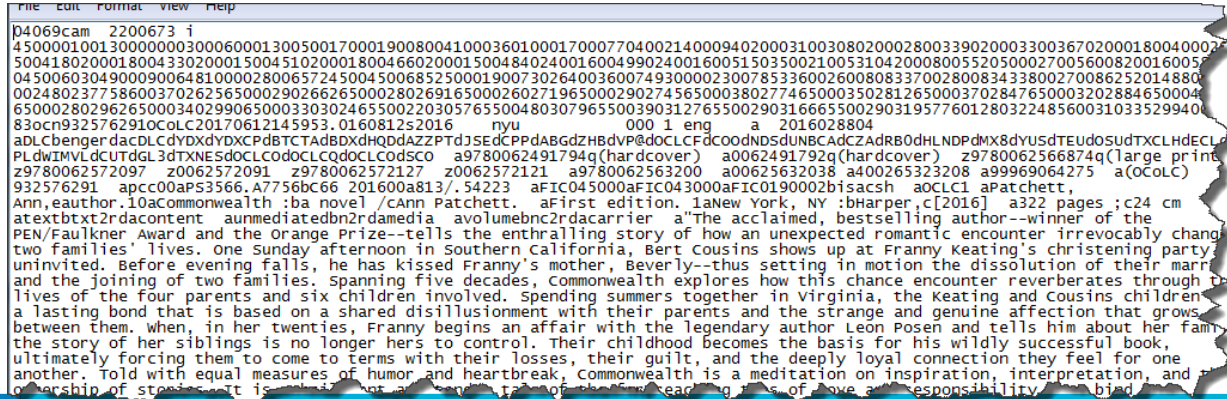
1343	DINAT	DINAT_1035652_1592967736464	:	bib:	:7471719	DINAT	14452797	14452797	49660231	49660231	1342657832	LBD_CREATE
1345	DINAT	DINAT_1035652_1592967736464	:	bib:	:75311910	DINAT	14473256	14473256	645241008	645241008	1342671393	LBD_CREATE
1346	DINAT	DINAT_1035652_1592967736464	:	bib:	:753395	DINAT	13828618	13828618	1159735265	1342702662		LBD_UNRESOLVED
1347	DINAT	DINAT_1035652_1592967736464	:	bib:	:7547862	DINAT	14452815	14452815	49797187	49797187	1342633926	LBD_CREATE
1348	DINAT	DINAT_1035652_1592967736464	:	bib:	:7722633	DINAT	14452859	14452859	49851831	49851831	1342682149	LBD_CREATE
1352	DINAT	DINAT_1035652_1592967736464	:	bib:	:80742753	DINAT	14474810	14474810	670429754	670429754	1342702295	LBD_CREATE

- OCWMS-OCWMS. 1234567.IN.BIB.D20200505.T092612933.**  
**1234567.OCWMS.OriginalFilename.mrc.LbdProcessingReport.txt**

## My Library Records (Own record return)

- My Library Records file are the library's own records returned with the OCN from the matching WorldCat record inserted in field 035 subfield \$a
- |     |  |                   |
|-----|--|-------------------|
| 035 |  | (OCoLC) 932576291 |
|-----|--|-------------------|
- File name contains **.mrc** extension
  - OCWMS-OCWMS. 1234567.IN.BIB. D20200505.T092612933.1234567.  
OCWMS.Recordupdates.mrc. **MyLibraryRecords.mrc**

035		(OCoLC) 932576291
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# REVIEW

# Gather your WorldShare logon information

If you have WorldShare access, talk with your library WorldShare administrator for access to Metadata > Collection Manager

Questions?

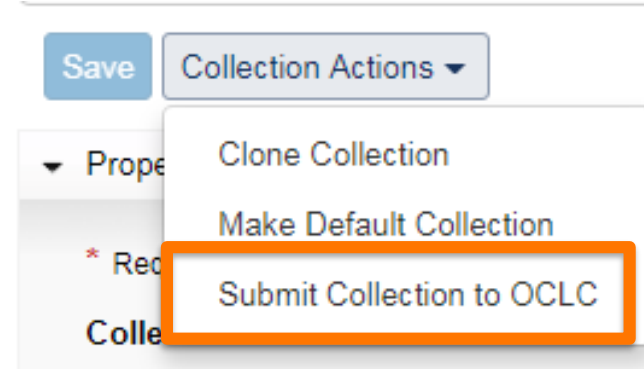
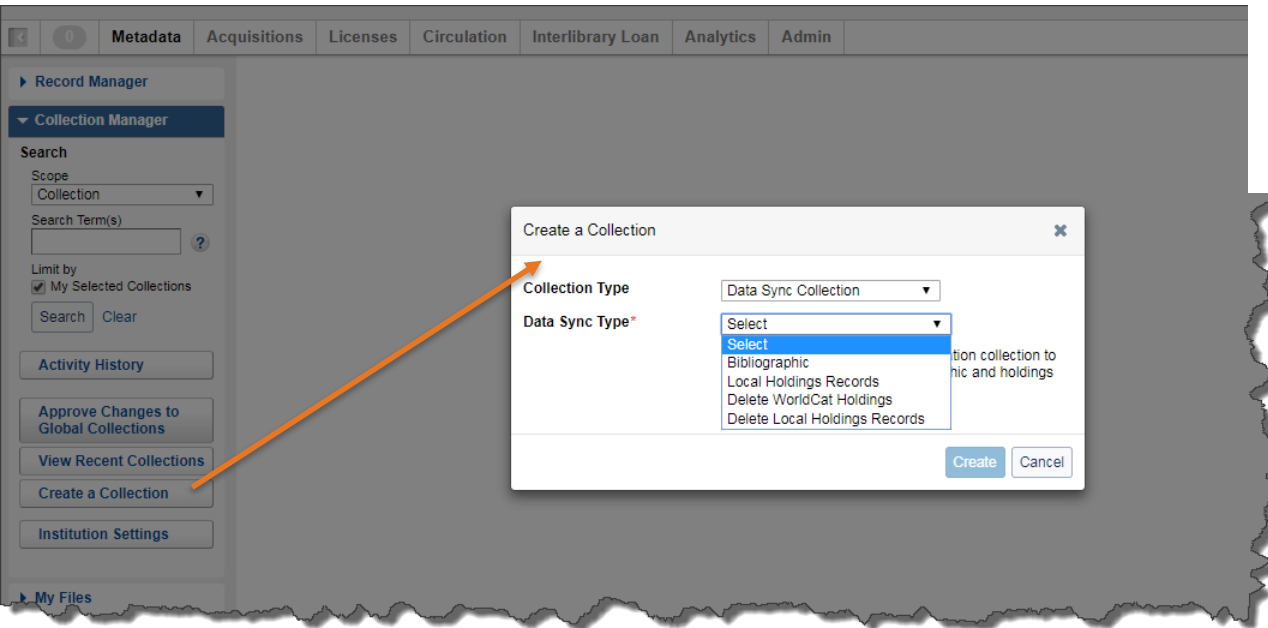
Contact OCLC Support  
[support@oclc.org](mailto:support@oclc.org)  
800-848-5800

## Request WorldShare Collection Manager Account:

Complete form at this link with your contact and library information

<http://www.oclc.org/content/forms/worldwide/en/wckb-request.html>

# Create and submit collection to OCLC



# Send MARC data via Metadata > My Files



0

Metadata

Acquisiti

► Record Manager

► My Labels

► Collection Manager

▼ My Files

Uploads

Downloads

## Uploads

### Upload File

Browse...

1004100.ts259.bibdata.mrc

File Type

- ☒ Data sync bibliographic  
☐ Data sync LHR

Upload

File Name	File Type	Size
1004100.ts259.bibdata.mrc	Data sync bibliographic	96 KB

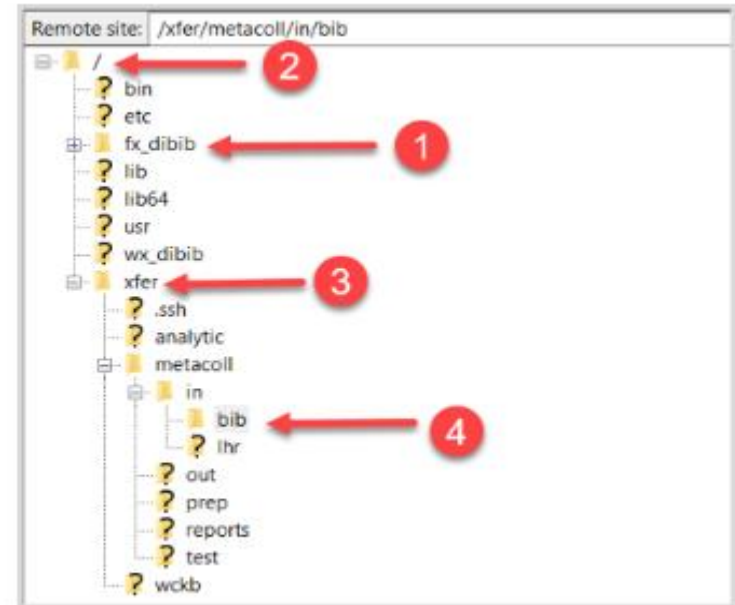
# Send files through OCLC file exchange server

## File exchange account credentials

Your file exchange account username:

- Is based on your existing OCLC symbol
- Is always lowercase; however, your account password is case-sensitive
- Will have one of the following formats:
  - **fx\_zzzzz** (replace **zzzzz** with your institution's OCLC symbol) – Used for OCLC products: This Manager and WorldShare Collection Evaluation.

Please contact [OCLC Support](#) to retrieve file exchange account credentials for your institution.



# SUPPORT RESOURCES








## Data sync collections

### Under Collection Manager

Use Collection Manager to synchronize your catalog with WorldCat. Create a data sync collection to maintain your holdings, local bibliographic data, and local holdings records in WorldCat. Match brief records in your local system to current WorldCat records to get a more complete representation of your holdings.

#### About data sync collections in Collection Manager






Data synchronization is an automated service which allows you to synchronize your holdings with WorldCat to make your collections visible and available through OCLC services.

-  [About data sync collections](#)
-  [Additional services](#)
-  [Available data sync collections](#)
-  [Branch-level scoping](#)
-  [Data sync collection interface overview](#)

...

#### Prepare your data

Discover how to evaluate your library's records and files for potential problems before you send your files.

-  [OCLC control numbers and data sync records](#)
-  [File naming conventions](#)
-  [Local system number](#)
-  [035 field and OCLC control numbers](#)
-  [Other common errors](#)

...

# Questions?

<https://help.oclc.org>



English

Release Notes

System Status Dashboard

Contact OCLC Support

## Welcome to OCLC Support

How can we help you?

Contact OCLC Support in your region

Last updated: Jul 30, 2020

Search

OCLC support regions

Table of contents

1. OCLC support regions
2. Recognize an OCLC star

Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox



# Thank you!

## **OCLC Support**

[support@oclc.org](mailto:support@oclc.org)

800-848-5800

## **Member Education**

[training@oclc.org](mailto:training@oclc.org)

